

# Approving a Document

Approval in Buy4Michigan is the means by which identified approvers signify their approval or disapproval of a procurement document. Organization Administrators establish who can approve, under what circumstances each person approves, and in what order.

When a document is submitted for approval, Buy4Michigan determines the users that must approve based on the criteria established by Organization Administrators, and notifies each approver via email once it is their turn to approve a document. Additional approvers may also be added manually by the user submitting a document, or any of that document's approvers.

## Overview

You may be asked to approve various types of Buy4Michigan documents. The table describes what you'll be approving when asked to approve each document type.

Document Type	Approval Question	Fields Available to Edit
Bid	<u>"Ready for Approval" Status</u> Should the Solicitation be published?	<ul style="list-style-type: none"> <li>- Bidders List</li> <li>- Attachments</li> </ul>
	<u>"Evaluated" or "Opened" Status</u> Should the recommended Solicitation award(s) be made?	
Purchase Order	<u>Open Market and Release Purchase Orders</u> Should the Purchase Order be sent to the vendor?	<ul style="list-style-type: none"> <li>- Item Commodity Codes</li> <li>- Accounting Information (if applicable)</li> </ul>
	<u>Contract and Master Blanket Purchase Orders</u> Should the finalized contract be sent to the contractor and be made visible publicly?	

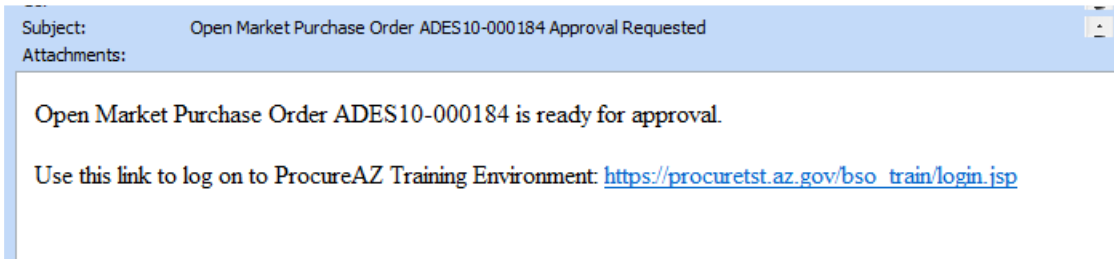
Once any type of document is submitted for approval, it enters the "Ready for Approval" status. All documents in this status can be characterized as follows:

- Limited editing capability exists to ensure that a document is not materially changed during the approval process so that an approver isn't recorded as having approved a document with substantial changes they did not see.
- All triggered approvers must approve in the order specified by Organization Administrators before the document can be processed further. No approvers can be skipped.

If any approver disapproves, the document is returned to the creator. If re-submitted for approval, it must travel down the entire approval path that is triggered upon re-submittal.

## Navigation

You'll be notified via email when a document requires your approval. The standard email message is displayed below. Note that the language that displays in the email is configurable by Organization Administrators from your agency.



Before you can review and approve a document, you must login to Buy4Michigan. To login to Buy4Michigan, input your user name into the "Login ID" field and the password you were given by an administrator into the **Password** field. Next, either hit **Enter** on your keyboard or click the **Login** button. Note that neither your login ID or password is case sensitive.



Once logged in, if you have access to multiple roles, ensure that the Basic Purchasing role is currently selected in order to enable you to approve a document. If you have been given only one role, you cannot choose another role and no role tabs will display.

The quickest way to locate documents requiring your approval is via the Approval tab on the Homepage. The **Documents Pending My Approval** section on this tab lists all of the documents that have been submitted by other users that require your approval in order to proceed. Documents within this section are separated by document type. Selecting the document number link on the left side of the screen will open the document and allow you to review it, then decide whether to approve, disapprove or cancel the document.

Home - Welcome Back Shashank Rao

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My Documents Pending Approval

Bid #	Description	Bid Opening Date	Approval Requested	Approver	Approval Status	Date Approved	Approval Type
<a href="#">00000009</a>	Training Plan A	03/29/2013 02:43:00 PM	03/20/2013 01:45:28 PM	Shashank Rao	Waiting...		Pre-bid

Purchase Order #	Purchase Order Date	Description	Approval Requested	Approver	Approval Status	Date Approved
<a href="#">00000004</a>	03/12/2013	Test Blanket PO	03/13/2013 08:35:53 AM 03/13/2013 08:35:53 AM	Shashank Rao Eric Jacobsen	Waiting... Waiting...	

Documents Pending My Approval

Bid #	Description	Purchase Method	Bid Opening Date	Dept/Loc	Purchaser	Total	Status
<a href="#">00000009</a>	Training Plan A	Open Market	03/29/2013 02:43:00 PM	TEST01 / TEST1	Shashank Rao	\$71,000.00	Ready for Approval

Purchase Order #	Purchase Order Date	Description	Account Fiscal Year	Purchaser	Dept/Loc	Total
<a href="#">00000004</a>	03/12/2013	Test Blanket PO	13	Shashank Rao	TEST01/TEST1	\$395.00

[List & Approve](#)

## Reviewing a Document

Upon selecting any document, the Summary tab of the document will display. The Summary tab contains all of the information entered on the document. The Summary tab of all documents contains **Header Information** and **Item Information** sections. Depending on the type of document (Requisition, PO, etc.), other sections may also appear on the Summary tab. On the bottom of the Summary tab, the approval options will appear, allowing you to approve, disapprove, or cancel the document.

## Providing Approval

Once you've finished your review, no matter what document type you are reviewing, you can view the approval path information for the document on the bottom of the Summary tab where you conducted your review. The **Approval Path** section displays all of the approvers that must review and approve the document for it to be processed forward and the order that they must approve it. If other approvers were asked to approve before you and approved the document, a date and time will appear in the **Date Approved/Disapproved** section in the row for that approver.

If you note that a person is not on the approval path that should review the document, you can add them by selecting their name in the dropdown box in the **Approver** column, assigning them an **Order Sequence**, and clicking **Add/Delete Approver**. Note that you will only be able to add approvers to the end of the existing approval path. If you would like to remove an approver you've added, you can click the check box in the **Delete** column and select **Add/Delete Approver**.

Pre-bid Approval Path:

Delete	Approver	Order Sequence	Approval Path ID	Level	Approver Type	Date Requested	Date Approved/Disapproved/Canceled	Approved/Disapproved/Canceled by	Comment View
	Shashank Rao	1		1	Primary	03/20/2013 01:45:28 PM			
Add New	<input type="text"/>	<input type="text"/>			Primary				

Add/Delete Approver

Once you are ready to document your approval decision, view the **Approval Actions** section below the **Approval Path** section on the Summary tab of the document you are approving. If you choose to “Approve,” this will trigger a notification to the next approver if there is one. If you are the last approver, the document will change status in order to allow for further processing. The user that can now process the document will be notified.

Approval Actions	
Options	<input checked="" type="radio"/> Approve <input type="radio"/> Disapprove <input type="radio"/> Cancel Bid
Comment	<input type="text"/>
<div>Save &amp; Exit</div>	
<div> <div>Cancel Bid</div> <div>Clone Bid</div> <div>Print</div> </div>	